

A vertical teal bar is positioned on the right side of the page, extending from the top to the bottom. It serves as a background for the top portion of the title and the 'Simply Better!' logo.

*Simply  
Better!*  
CONTINUOUS IMPROVEMENT

# Self-Assessment System

## Customer Focus and Satisfaction Dimension Workbook

## Overview to the Self-Assessment System

### Dimension Workbooks

- Customer Focus and Satisfaction
- Leadership
- Information and Analysis
- Strategic Planning
- Human Resource Development
- Management of Process Quality
- Quality and Results

### Guidebook for Conducting the Self-Assessment

These icons will help you to find your way through all Simply Better! products:



Resources



Answer-Score-  
Brainstorm



Group  
Exercise



Case Study



Helpful  
Hints



Key terms  
and Concepts



Useful Notes



World Class

### Introduction

**Customer Focus and Satisfaction** examines your organization's knowledge of customer requirements and how relationships with customers are established and maintained. It also examines the methods used to determine customer satisfaction and the trends and current levels of customer satisfaction.

By the time you have completed the dimension, you will have identified strengths and opportunities for improvement in these five sections:

#### **A. Customer Expectations**

How your organization seeks to understand customers' needs and expectations.

#### **B. Customer Service and Quality Standards**

How your organization develops quality indicators and service standards.

#### **C. Customer Relationship Management**

How your organization builds relationships with customers and uses the information to improve those relationships and improve processes and services.

#### **D. Determining Customer Satisfaction**

How your organization determines its customers' satisfaction and how methods for determining customer satisfaction are evaluated and improved.

#### **E. Customer Satisfaction Results**

How your organization measures customer satisfaction (and dissatisfaction) results and how its results compare to those of other similar providers.

# The Self-Assessment System

## Customer Focus and Satisfaction

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In a world class organization, quality is judged by customers. The key focus of the organization is on the products and services that customers value and that lead to customer satisfaction and future preference.

Value, satisfaction, and preference may be influenced by many factors. These factors include the organization's relationship with customers, which helps to build trust, confidence, and loyalty.

Customer-driven quality is a strategic concept. It is directed toward customer retention and expansion. It demands constant sensitivity to customer requirements and the measurement of the factors driving customer satisfaction and retention.



### Customer

The people, organizations, or groups receiving the products or services of your organization. In the S-A-S, customers are job-seekers and employers, the direct beneficiaries of local workforce development services.

### Service

Work done for others. The completion of a process that provides an intangible product, which meets a particular customer need. Some workforce development services include job information and referral, training, and filling job orders.

### Customer Driven Quality

Consistently meeting and/or exceeding the ever-increasing needs and expectations of the customer.

### Customer Satisfaction

The degree to which your organization meets or exceeds the needs and expectations of those you serve.

### Customer Transaction

The interaction or act of contact between an organization and its customer. Frontline staff are a common point of personal interaction in a local workforce development organization.

### Service Standard

The desired achievement level for the measured performance of a service. Service standards should address key aspects of services including integrity, cost, and quality.

### Getting Started

Now that you are familiar with the continuous improvement concepts and terms for Customer Focus and Satisfaction, you are ready to look at how your own organization handles these issues. There are five exercises to complete this dimension.

#### **Answer** the Questions

This exercise involves developing a shared understanding of how your organization works. When discussing and answering the questions, your team should develop a common understanding of what is done, who does it, how often, how well, the results achieved, and how well it is documented.

#### **Score** the Questions

This exercise is about determining a consensus team score for each section. Each question or sub-element of a question has equal weight. Please see the instructions on the next page.

#### **Brainstorm** Strengths and Opportunities

This exercise will help you identify your organization's strengths and opportunities for improvement. Brainstorming can occur after each question is scored or after the entire section has been scored. The purpose of brainstorming is to get ideas out quickly; discussion will come later during the next exercise. All ideas should be recorded using a flip chart or the blank spaces provided in the Brainstorm sections of the booklet.

#### **Discuss and Rank** Strengths and Opportunities

This exercise will help you to make your many lists of strengths and opportunities much more manageable. It will be done after you have finished answering, scoring, and brainstorming for all sections in the dimension. Please see the instructions near the end of the booklet.

#### **Plan** for Action

This exercise will lead your team through several initial steps in the overall process for implementing continuous improvement changes. This step may be optional for your team at this stage, depending on what process your organization has chosen to develop a final action plan.

# The Self-Assessment System

## Customer Focus and Satisfaction

### Score the Questions

Follow these instructions to find your team score for where your organization stands on Customer Focus and Satisfaction.

#### Step One

Individually or as a team decide where your organization falls along the thermometer. This is a continuum, so don't be afraid to locate yourself anywhere along the thermometer.

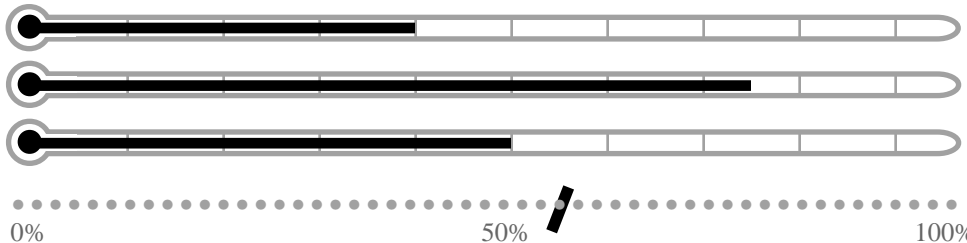
#### Step Two

Using a crayon or marker, fill in the thermometer up to the point on the scale which best matches your organization. Remember, this is a subjective judgment, so precision is impossible!



#### Step Three

For each section, mark the average score on the bottom scale. You may want to eyeball the average length of the lines to come up with a score, or you may want to compute the average. Again, because this is subjective, precise scoring is not necessary.



In this example, the score is about 55%, which is very good! Most organizations seriously involved in quality and continuous improvement can expect to fall in the 40% - 60% range. Even nationally recognized award winners rarely score above 75% across all categories.

## Answer Score Brainstorm



Within each of the Sections - **A** through **E** - you will repeat the following three exercises:

- **Answer** the questions as a team.
- **Score** your organization.
- **Brainstorm** strengths and opportunities for improvement.

After you have covered all of the sections in the dimension, you will complete your work by doing the final two exercises:

- **Discuss and rank** your entire list of strengths and opportunities for improvement.
- **Plan** for action (optional at this stage).

You now have the background information and instructions you need to begin to answer, score and brainstorm the questions for Customer Focus and Satisfaction. Before you continue, be sure that everyone on your team understands the general concepts and terms being used. Also, be sure that everyone has a clear understanding of the instructions and scoring system. Finally, check for consensus about the process that will be used. Remember, this is your process, so feel free to modify and improve it to suit the needs of your team and organization.

## A. Customer Expectations

You may complete this section one of two ways:

### Option 1

- **Answer** the entire section
- **Score** the entire section
- **Brainstorm** the entire section

### Option 2

- **Answer** question 1
- **Score** question 1
- **Brainstorm** question 1
- Continue with questions 2-4



**Answer** these questions:

1. What are the major services we are providing?
2. Who are the customers of these services?
3. How do we identify our customers' needs and expectations?
4. How do we evaluate and improve our process for determining customers' needs and expectations?



**Q3.** Customers' needs and expectations, even for the same service, should be determined separately for distinct groups or segments. For example, the needs and expectations of older workers may differ greatly from those of youth or laid-off workers. Clearly, those of employers would be substantially different from the others.

A systematic approach for identifying customers' needs and expectations might document: how customer groups are selected; how information is selected for collection and methods for collecting it; statistical standards for the information; how particular service features and their relative importance to customers are determined; and how other customer-related information is to be used. Future requirements might be obtained through listening and learning strategies which involve close monitoring of societal and demographic factors that may influence expectations, focus groups with demanding customers, training of frontline staff in customer listening, use of critical incidents to understand key service attributes, and interviewing those who were unsuccessful in using the services.

**Q4.** The information collection system might be regularly improved by looking at factors such as: the adequacy and timeliness of customer-related information, improvement in survey design, best approaches for getting reliable and timely information, changing importance of service features among customer groups, and the most effective listening strategies.



# The Self-Assessment System

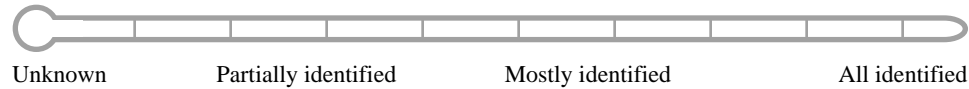
## Customer Focus and Satisfaction

### Score Section A



#### 1. What are the major services we are providing?

Our key services are:



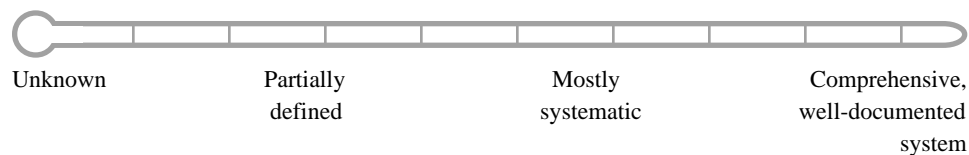
#### 2. Who are the customers of these services?

Our customers are:

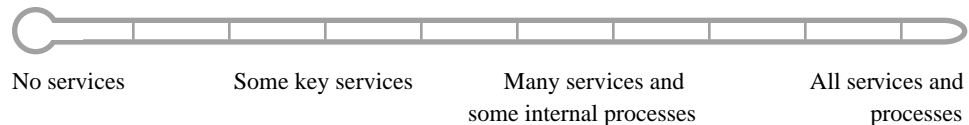


#### 3. How do we identify our customers' needs and expectations?

Our approach for identifying customers' needs and expectations is:

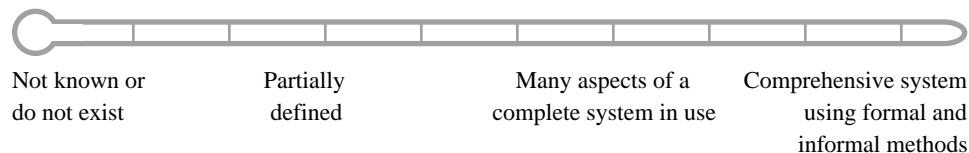


We identify customers' needs and expectations for:

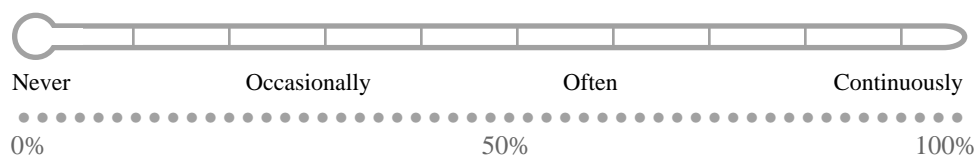


#### 4. How do we evaluate and improve our process for identifying customers' needs and expectations?

Our methods for reviewing and improving our system for getting customers' input are:



In order to find reliable and cost-effective ways to identify customers' needs and expectations, we review and modify our processes:





## Brainstorm Section A

- Going in a circle, have each member of the team share one strength (passing is allowed).
- Record the idea on a flipchart; discuss the idea only enough to make sure that it is correctly recorded.
- Keep going around until everyone's ideas are recorded.
- Repeat the same process for opportunities for improvement.

**Strengths**

**Opportunities for Improvement**

## B. Customer Service and Quality Standards

You may complete this section one of two ways:

### Option 1

- **Answer** the entire section
- **Score** the entire section
- **Brainstorm** the entire section

### Option 2

- **Answer** question 1
- **Score** question 1
- **Brainstorm** question 1
- Continue with questions 2-3

**A**nswer these questions:

1. **How do we develop quality indicators and service standards which strengthen future customer relationships?**
2. **What are our service standards and how are they communicated to our employees?**
3. **What commitments do we make to our customers to build confidence in our services?**



**Q1.** Managing relationships provides a potentially important means for organizations to gain understanding about and to manage customer expectations. Frontline staff may provide vital information about building longer-term relationships with customers.



**Q2.** Performance measures and service standards apply not only to employees conducting transactions with customers but also to other units which make effective transactions possible.

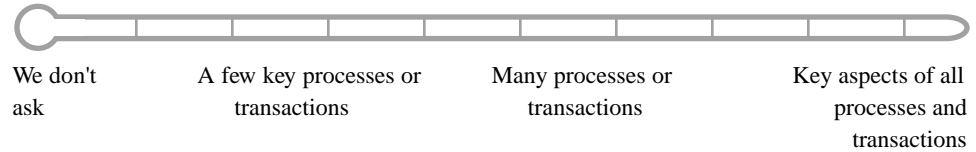
**Q3.** Commitment to customers can build trust and confidence. Public workforce development services are generally not considered to be entitlements so guarantees as commitments may not be appropriate; but, committing to quality service and customer satisfaction can be a useful marketing and management tool.



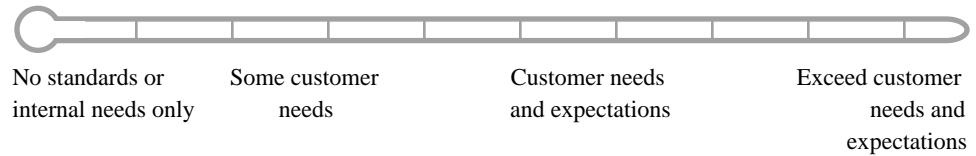
### Score Section B

#### 1. How do we develop quality indicators and service standards which strengthen future customer relationships?

Our quality indicators are developed from what customers tell us about:

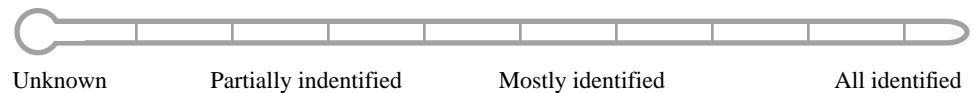


We set service standards at levels which meet:

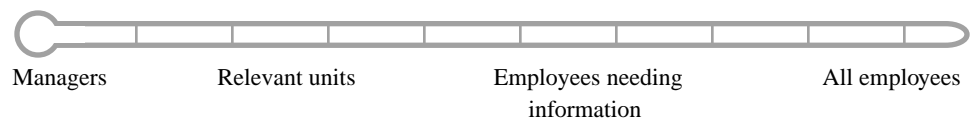


#### 2. What are our service standards and how are they communicated to our employees?

Our service standards are:

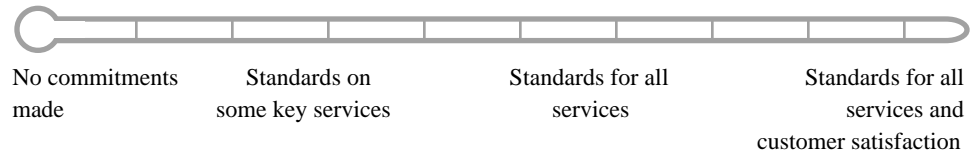


Our service standards are communicated to:



#### 3. What commitments do we make to our customers to build confidence in our services?

We make commitments to meet:



## Brainstorm Section B



- Going in a circle, have each member of the team share one strength (passing is allowed).
- Record the idea on a flipchart; discuss the idea only enough to make sure that it is correctly recorded.
- Keep going around until everyone's ideas are recorded.
- Repeat the same process for opportunities for improvement.

### Strengths

### Opportunities for Improvement

## C. Customer Relationship Management

You may complete this section one of two ways:

### Option 1

- **Answer** the entire section
- **Score** the entire section
- **Brainstorm** the entire section

### Option 2

- **Answer** question 1
- **Score** question 1
- **Brainstorm** question 1
- Continue with questions 2-3



**Answer** these questions:

1. How are customers able to seek help, comment, or complain?
2. How do we follow up with customers to seek feedback, resolve problems, and build relationships?
3. What do we do with customer complaints and feedback?



**Q1.** Improvement in customer relationship management might require training for customer-contact employees. This should address key service knowledge, listening to customers, solicitation of comments, anticipating and handling problems, and managing expectations.

Many workforce development organizations have formal complaint systems to handle complaints about violations of law or regulation. Less formal complaint processes should also be set up to invite and resolve complaints about program quality or customer satisfaction.

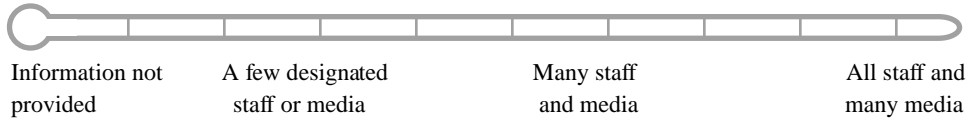
**Q3.** A complaint management process might include establishing standards, based on customer requirements, for efficiency, timeliness, and effectiveness of resolution; collecting and analyzing complaint information; and procedures for improving services.

### Score Section C

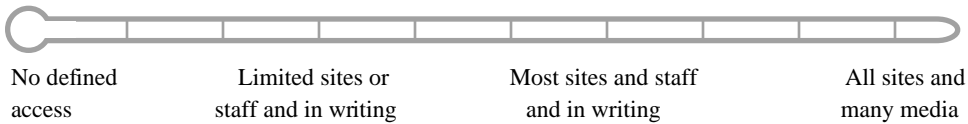


#### 1. How are customers able to seek help, comment, or complain?

We provide information on how customers can seek help, make comments, or complain through:



We provide our customers access to seeking help, making comments, or complaining through:

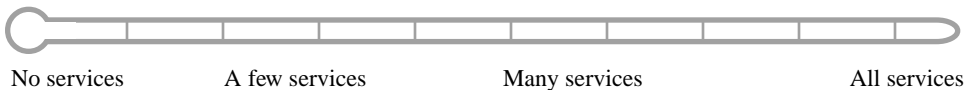


#### 2. How do we follow up with customers to seek feedback, resolve problems, and build relationships?

Our process for following up on recent customer transactions is:

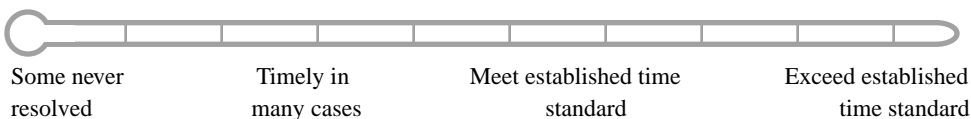


We conduct follow-up for:

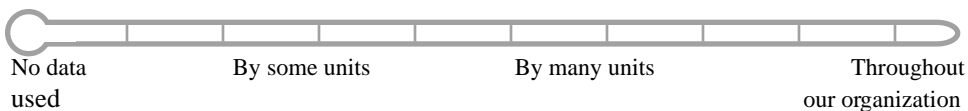


#### 3. What do we do with customer complaints and feedback?

We resolve formal and informal complaints:



Data from complaints and feedback are aggregated, evaluated, and used to improve services:





## Brainstorm Section C

- Going in a circle, have each member of the team share one strength (passing is allowed).
- Record the idea on a flipchart; discuss the idea only enough to make sure that it is correctly recorded.
- Keep going around until everyone's ideas are recorded.
- Repeat the same process for opportunities for improvement.

**Strengths**

**Opportunities for Improvement**



## D. Determining Customer Satisfaction

You may complete this section one of two ways:

### Option 1

- **Answer** the entire section
- **Score** the entire section
- **Brainstorm** the entire section

### Option 2

- **Answer** question 1
- **Score** question 1
- **Brainstorm** question 1
- Continue with questions 2

**Answer** these questions:

1. **What methods, measures, and frequency do we employ to measure customer satisfaction?**
2. **How have we improved our methods, measures, and frequency?**



**Q1.** Methods for measuring customer satisfaction include surveys, focus groups, intercept interviews, and employee contact.

A comprehensive customer satisfaction measurement system might include how information is selected for collection; the methods for collecting it; standards for frequency, objectivity and validity of the information; and analysis methods and techniques. An effective customer satisfaction measurement system is one that provides your organization with reliable information about customer ratings of specific service features and the relationship between those ratings and customers' likely future behaviors pertinent to the organization achieving its goals.



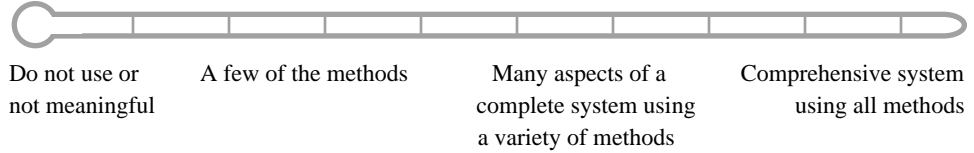
**Q2.** Evaluation of the measures might consider what relationship can be found between customer satisfaction with key aspects of assessment or training and the customer's eventual attainment of self-sufficiency; or employer satisfaction with training or job development and growth in employer job listings. Evaluation might also consider measures of customer dissatisfaction such as complaints, shrinkage in the employer base, or premature terminations from program services.



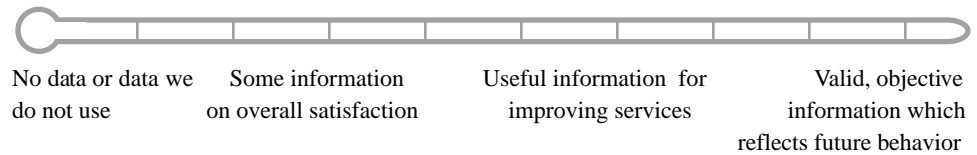
### Score Section D

#### 1. What methods, measures, and frequency do we employ to measure customer satisfaction?

We use meaningful surveys, focus groups, interviews, and other methods:



The measures we use provide:

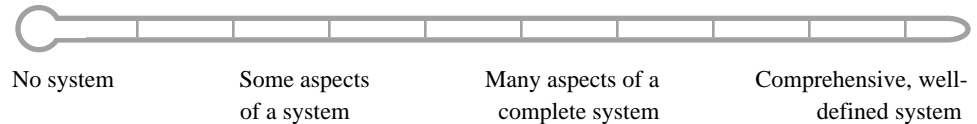


We measure customer satisfaction:



#### 2. How have we improved our measures, methods, and frequency?

Our practices for evaluating and revising our methods and measures for determining customer satisfaction comprise:



We evaluate and revise our methods and measures:



## Brainstorm Section D



- Going in a circle, have each member of the team share one strength (passing is allowed).
- Record the idea on a flipchart; discuss the idea only enough to make sure that it is correctly recorded.
- Keep going around until everyone's ideas are recorded.
- Repeat the same process for opportunities for improvement.

## Strengths

## Opportunities for Improvement

## E. Customer Satisfaction Results

You may complete this section one of two ways:

### Option 1

- **Answer** the entire section
- **Score** the entire section
- **Brainstorm** the entire section

### Option 2

- **Answer** question 1
- **Score** question 1
- **Brainstorm** question 1
- Continue with question 2



**Answer** these questions:

1. **What are our key measures of customer satisfaction and how are we doing?**
2. **Do we compare our results to those of other organizations? How are we doing?**



**Q2.** Comparisons could be based on customer satisfaction ratings, retention statistics, survey results, competitive awards, recognition, and ratings by independent organizations.

# The Self-Assessment System

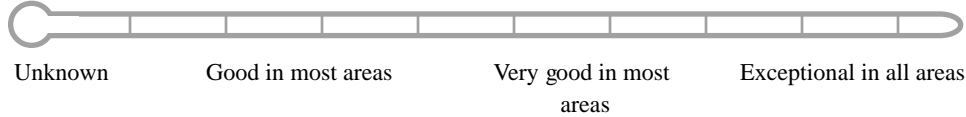
## Customer Focus and Satisfaction

### Score Section E

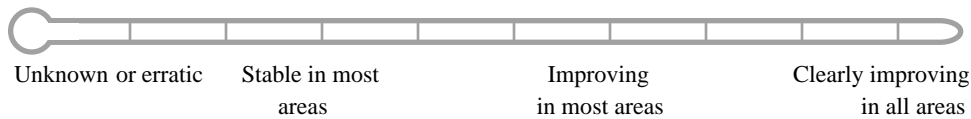


#### 1. What are our measures of customer satisfaction and how are we doing?

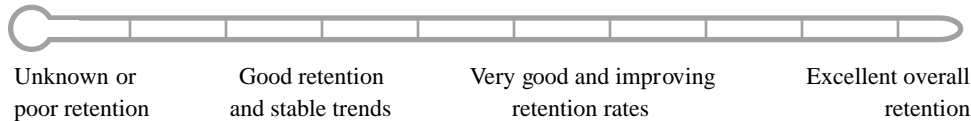
Our customer satisfaction results are:



Our trends in customer satisfaction have been:

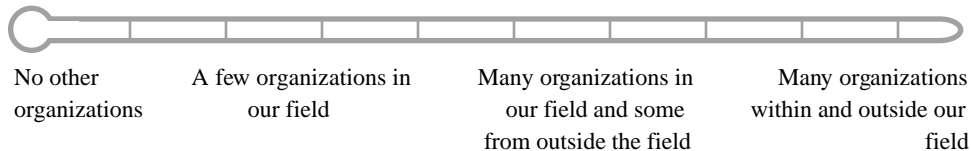


Our customer retention measures indicate:

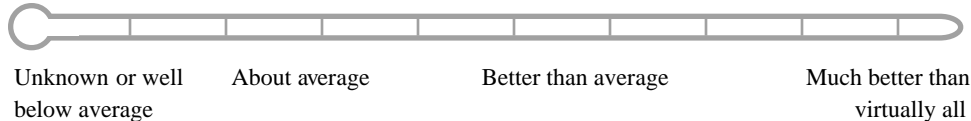


#### 2. Do we compare our customer satisfaction results with those of other organizations? How are we doing?

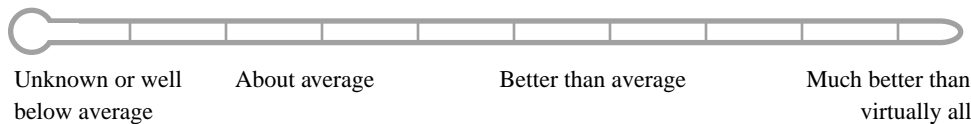
We compare ourselves to:



Our performance compared with other organizations in our field is:



Our performance compared with organizations outside of our field is:





## Brainstorm Section E

- Going in a circle, have each member of the team share one strength (passing is allowed).
- Record the idea on a flipchart; discuss the idea only enough to make sure that it is correctly recorded.
- Keep going around until everyone's ideas are recorded.
- Repeat the same process for opportunities for improvement.

**Strengths**

**Opportunities for Improvement**

## Summary of Team Scores

Average the five scores to get an overall score for Customer Focus and Satisfaction.

|   |                      |                                      |                      |
|---|----------------------|--------------------------------------|----------------------|
| A. Customer Expectations                  | <input type="text"/> | D. Determining Customer Satisfaction | <input type="text"/> |
| B. Customer Service and Quality Standards | <input type="text"/> | E. Customer Satisfaction Results     | <input type="text"/> |
| C. Customer Relationship Management       | <input type="text"/> | Overall Score                        | <input type="text"/> |

Remember, this is not a score of how good your organization is - it is a score reflecting how far you are on the road to continuous improvement. This is what the scores tell you:

### 0% - 10%

You have not or have barely begun to implement continuous improvement into your processes.

### 10% - 30%

You have begun to implement continuous improvement in a few of your processes.

### 30% - 60%

You have implemented continuous improvement in a wide range of your processes in many parts of your organization.

### 60% - 80%

You have implemented continuous improvement processes throughout virtually all of your organization.

### 80% and above

You have world-class, exceptionally sophisticated processes in all areas of your organization, and you continuously improve the processes themselves.



## Discuss and Rank Strengths and Opportunities

Now that you have answered and scored the questions and brainstormed strengths and opportunities for improvement, you need to make some sense of the large quantities of information you have. This exercise will help you to make this information much more manageable. Your flipcharts should be hung around the room where everyone can see them.

- **Group** the similar strengths and opportunities into categories to make the list more manageable. Depending on how many items you have, you may want to start out by brainstorming categories, by eliminating duplicate items, or by marking similar items with numbers or colored dots. Individual items may fall into more than one category. As with brainstorming, there should not be much discussion at this stage, just enough to develop the categories.
- **Choose** the order in which you want to discuss the strengths and opportunities listed. Some may not require much discussion. It can be helpful to set time limits for each item.
- **Discuss** the strengths and opportunities in depth. You do not need to solve problems now; you only need to be sure that you come to a common understanding of which are the most vital to be worked on or represent potential for taking action right away.
- **Rank** the opportunities in the order of importance for developing next steps and future actions.



### Plan for Action



Many teams will be instructed by the coordinator to begin the process of planning for action. This process will lead your team through action planning steps and will result in an initial redesign of a service or process.

- **Select** a service or process to be improved. From the list of Opportunities for Improvement select one of the top vital few which were identified as a result of answering the questions. The relative scores for each question or section should provide a starting point for identifying where the largest gaps exist. The priorities for improvement in the organization should also be considered. Decision can be reached by multi-voting and coming to consensus.
- **Describe** the current process. Definition of the current situation began while answering the questions. Further research is now needed to identify the key features of the current process, describe the work flow, and identify current process measures.
- **Determine** the wants, needs, and expectations for the service or process. Determine who the 'customers' of the process are and what they want, need and expect. This step helps define the future desired state for the area under improvement.
- **Gather** data to determine the extent to which the current process meets the wants and expectations. Doing this step provides vital measurable information about the extent to which current reality meets the desired level of performance.
- **Redesign** the improved process to meet the wants, needs, and expectations. Define the design criteria and design the improved process. A measurement system should also be established, and requirements for implementation should be determined.

## Take Action

After your team completes the five action planning steps for several of the top-ranked opportunities for improvement, it is time to stop. Your assessment work within this dimension is complete.

### **Congratulate yourselves for your hard work and accomplishments!**

Your next steps are to get together with all the other dimension teams to share what everyone has found and to discuss and rank all the vital opportunities. Once your organization chooses the most important opportunities for taking action, you are ready to take the last two steps in the continuous process improvement model - implement the improvement and manage the process of change.

- **Implement** the improvement. Develop an implementation plan which specifies desired results, assigns responsibilities, and provides time frames. The plan should be approved, communicated, and monitored for results.
- **Manage** the process of change. Obtain customer feedback, monitor performance and impact, communicate the results, and fine tune the process by identifying new areas for improvement.